Customer Relationships and Satisfaction

PH Standard 9.1.6 B:
"Implement a systematic process for assessing and improving customers' satisfaction with agency services"

Presented by:

May 11, 2011 (updated 10-10-11)

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www.doh.wa.gov/phip/perfmgtcenters/index.htm

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Learning Objectives

After attending this session, you will be able to:

- Discern the difference between your organization's direct and indirect customers
- Describe the value of measuring and improving customer satisfaction
- Describe differences between qualitative and quantitative customer information
- Identify options for collecting qualitative information
- Apply a Likert scale
- Identify factors for analysis

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Poll

What is your agency doing now regarding customer relationships and satisfaction?

A. Nothing formal

B. Increasing emphasis on customer service

C. Experimenting with surveys/needs assessments in 1 or 2 programs

D. Department-wide formal efforts at measuring and enhancing customer satisfaction

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Customer Relationship Mantra

- Who are the customers?

- What do they need?

- Are we providing it?

- How do we know?

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Wait!

Are we sure we care?

Does customer satisfaction really matter to your agency?

- If so, why?
- If not, why not?

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Why should we care?

- HD's tend to compare favorably to the "DMV"

- That is not a standard which will breed
  - positive word of mouth
  - support for tax allocations
  - toleration of fees
  - extension of grants
  - full active participation in programs

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Who is the customer?

- Not always easy to define in service industry

- Especially hard in government services

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Who is the customer?

Different customers, different interests
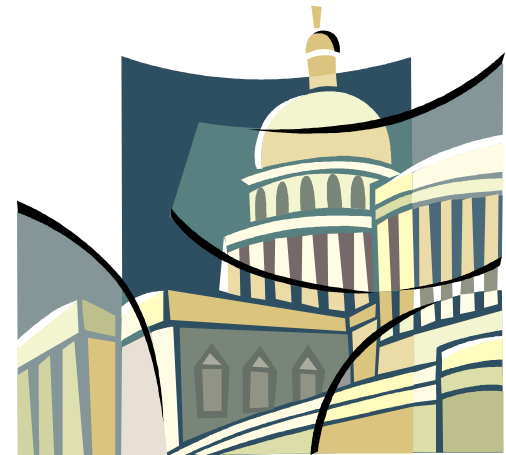
Reimbursement Requirements

Payers

Feds/State/BOH

Legal/Regulatory Requirements

Health needs/ Tax burden

Service Experience/ Technical Quality

Department Policies

General Public

Senior Mgmt

Clients/patients/direct customers

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Who is the customer?

Where is your focus?

Internal Focus　　　　　　　　　　　　　　　　**External focus**

Payers

LHJ Mgmt

B.o.H.　　　　　　　　　　Clients/Patients

LHJ Staff

Providers

Feds/State

General Public

Who are the DIRECT customers?

May be easier to define on a program-specific basis

- Who receives the "output" of the process?

- Who "experiences" the process?

- Who is "paying" us?

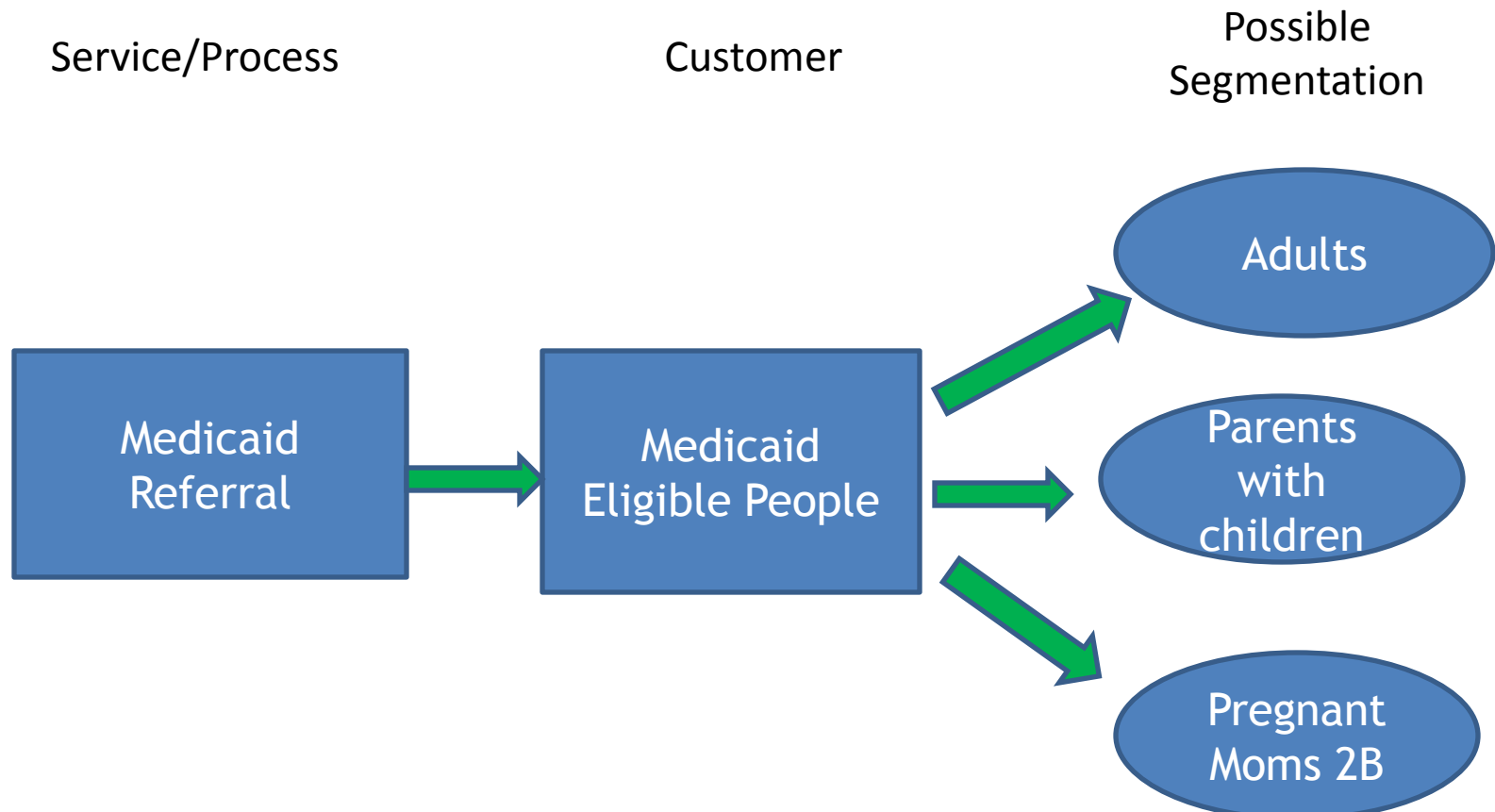Inputs → Process → Outputs → Customer(s) → Impacts & Outcomes

Who are the DIRECT customers of...?

- Your food program?

- Your immunization program?

- Your visiting nurse/social worker program(s)?

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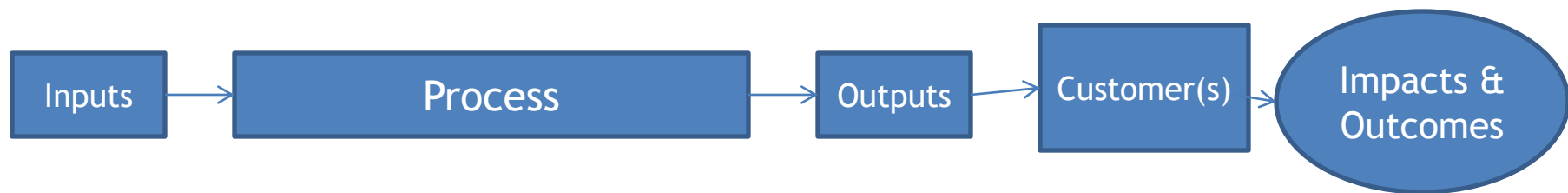
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Who are the customers?

Service/Process

Customer

Possible Segmentation

Medicaid Referral → Medicaid Eligible People → Adults

Medicaid Eligible People → Parents with children

Medicaid Eligible People → Pregnant Moms 2B

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What do customers need*?

*Require, want, prefer …

- Have you talked with them?
- Be wary of assumptions!

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Customer Needs Assessment

- Customer Needs are *qualitative data*

- You need to obtain customer needs data with *open-ended* questions

- Ideally, you will have an opportunity to *probe and follow-up* on customer responses

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How to gather customer needs data …

- Interviews
  - In person
  - Phone
  - Email/Chat/Web meeting
- Focus Groups
- *Qualitative* Surveys (as opposed to *quantitative* surveys)
- Observation
- "Artifacts" … complaints, comments on surveys, etc.

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Customer Needs Assessment

- Ask what about their *service experience*
  - Steps
  - Interactions
  - What we require them to do
- Ask about the *results* they are looking for
- Ask about the characteristics of the *products/outputs* they receive from us
- Look for service features that:
  - "Delight" if present
  - "Dissatisfy" if present / not present

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Service Features

- ## Think of a recent service experience …
  - – What about that was positive enough that you remembered it/were delighted by it?
  - – What about it was disappointing or dissatisfying?

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Kano Diagram
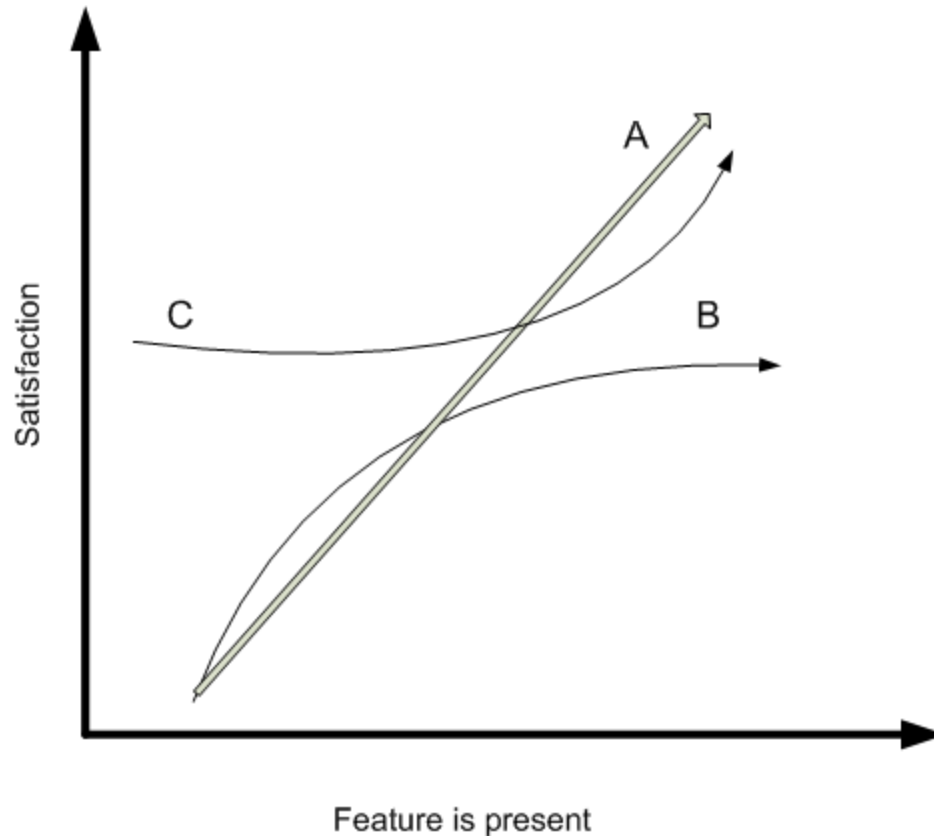
A = more is always better
B = dissatisfied if not present; don't notice if it is
C= don't notice if it's not there; delighted if it is

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Determine Customer Needs

Dig!

- "Why is that important?"

- "What do you mean by that?"

- "Could you give me an example?"

The most significant needs often lie beneath the surface

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Example

Prompting Question:

When dropping your car off for service, what's important to you?

Probes:

Why is that important?

What does _____ mean to you?

Are there circumstances where that would be different?

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Break

Measuring Satisfaction

How do we know we are meeting customer needs?

Quantitative Evaluation

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Slow Down!

It's common to rush into surveys without...

- Knowing what your customer cares about
- Thinking about how/whether you will use the information
- Knowing how data will be input/analyzed

Quantitative Surveys

- Specific, closed-ended questions
- Responses can be counted
- Can show trends, patterns that tell you how you are doing
- Should be aligned to known customer needs

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Customer Satisfaction Surveys

Multiple possible purposes

- Knowing range of satisfaction
  - Understanding whether or not/ to what extent you are satisfying customers

- Finding specific areas to improve
  - Identifying which aspects of service may need improvement
  - Getting specific ideas from customers about what could be better

- Quality Assurance/Service Recovery
  - A devise for staff/mgmt to use to follow-up on specific transactions

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What are your purposes?

Polling question:

For those of you surveying or thinking about surveying your customers, what are your primary purpose(s)?

A. Identifying range of satisfaction

B. Finding specific areas to improve

C. Quality Assurance/Service Recovery

D. A combination of the above

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Capturing Quantitative Responses

- Likert* Scales
  - 1-5
  - 1-4
  - Etc.

- Binary
  - Yes/no; true false

Rensis Likert – University of Michigan, 1950's

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Capturing Quantitative Responses

The limits of binary responses

- Yes/No, True/False surveys are quick to fill out and easy to analyze, BUT >>>

- They tell you far less about how customer feels

- Do not show the distribution of responses

- Don't tell you if you're getting a "C" or an "A" grade from the customer

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Example 1: Question with Likert approach

To what extent do you agree with the following statement:

"The Health Department responded to my request in a timely manner"

- Strongly agree

- Somewhat agree

- Neither agree nor disagree

- Somewhat disagree

- Strongly disagree

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Example 2: Question with Likert approach

"How satisfied were you with the response time of the Health Department?"

- Extremely satisfied

- Somewhat satisfied

- Somewhat dissatisfied

- Extremely dissatisfied

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Example 3: Question with Likert approach

"Please rate the service you received from the Health Department today:"

- Excellent

- Good

- Average

- Fair

- Poor

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Likert Scales – How many?

- Odd number allows for a neutral response

- Even number forces the customer to commit one way or another

- A 4 point Likert scale is commonly used for satisfaction & marketing surveys;

    - avoids a neutral response

    - still shows distribution

- Researchers/epidemiologists prefer odd scales (esp. 5 point) because they can learn something from the neutral respondents

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Exercise

- Think of a specific program/service

- Think of a specific customer need regarding that program/service

- Write a survey question which might tell you to what degree you were meeting that need

Use your chat box when you are ready

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What do you want to analyze by?

- Look ahead to how you will want to break-down the information
  - Customer type
  - Demographics
  - Service/program type
  - Time of day/day of week
  - Location
  - ETC
- Include this information in the data collection

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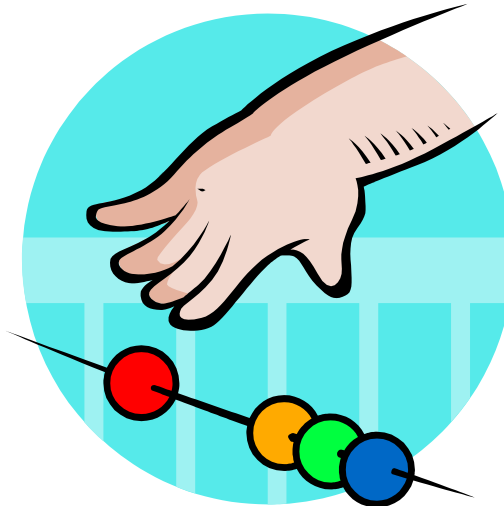# *Public Health Performance Management Centers for Excellence*

Satisfaction Surveys: Response Rate

- Response rates to satisfaction surveys are often low … 15-20% is a pretty good rate

- Increase response rate by:
  - Limiting the number of questions you ask
    - Your response rate will drop with every additional question, and pretty much disappear after 15 questions
  - Make it as easy and quick as possible to complete
  - Make it as easy as possible to submit the response

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Satisfaction Surveys: Selection Bias

- Beware omitting key groups/segments
- Try for a random sampling

Survey Distribution Choices

- Paper, in person (response rate will be relatively high)

- Paper, by mail (response rate will be very low)

- Email/web (Survey Monkey, etc.) (response rate will be low)

- Phone (expensive, response rate will be low)

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Comments Section

- Consider adding at least one open ended "comments" section to your survey

- Will provide clues as to what you might add/change/stop IF your quantitative indicator shows an area for improvement

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Quantitative Satisfaction Survey Example

Tacoma | Pierce County
Health Department
Healthier. Safer. Smarter.

Customer Survey: Vital Records Program

What did you come in for today?
☐ Birth Record
☐ Death Record

You are:
☐ General Public
☐ Funeral Home Director/Staff

	Strongly Agree	Agree	Disagree	Strongly Disagree
The hours of operation met my needs.	☐	☐	☐	☐
I was served promptly.	☐	☐	☐	☐
Staff listened to my concerns and treated me in a respectful way.	☐	☐	☐	☐
Staff gave me helpful information or resources.	☐	☐	☐	☐

	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied
Overall, how satisfied were you with our service today?	☐	☐	☐	☐

How can we improve for you?

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Quantitative Satisfaction Survey Example

Environmental Health Customer Service Survey **(Kitsap County)**

Dear Customer,

Please take a minute to complete the following brief customer service questionnaire for the service you received today.

Our goal is to provide our customers with the best service possible. Your comments will enable us to see how we're doing and help us improve. Your comments are confidential and will only be reviewed by the Program Manager. Thank You!

What was the purpose of your visit to the Health District today?

Food Service submittal/information   Homeowner submittal or assistance

Contractor submittal/review   Other _____

Please rate how well we are doing in the following areas:

		Excellent	Good	Average	Fair	Poor
1.	The "wait time" before the clerical staff were able to assist you with your EH needs?					
2.	Clerical staff politeness, courteousness and friendliness? Did they seem interested in your needs?					
3.	Clerical staff's effort to make this a positive experience for you?					
4.	Clerical staff's knowledge and ability to help you or to get you to someone who could help you?					
5.	Our overall customer service?					
6.	If you gave a low score of Fair or Poor above, how might we improve in that particular area?					

Would you like the manager to follow up with you about the service you received today?
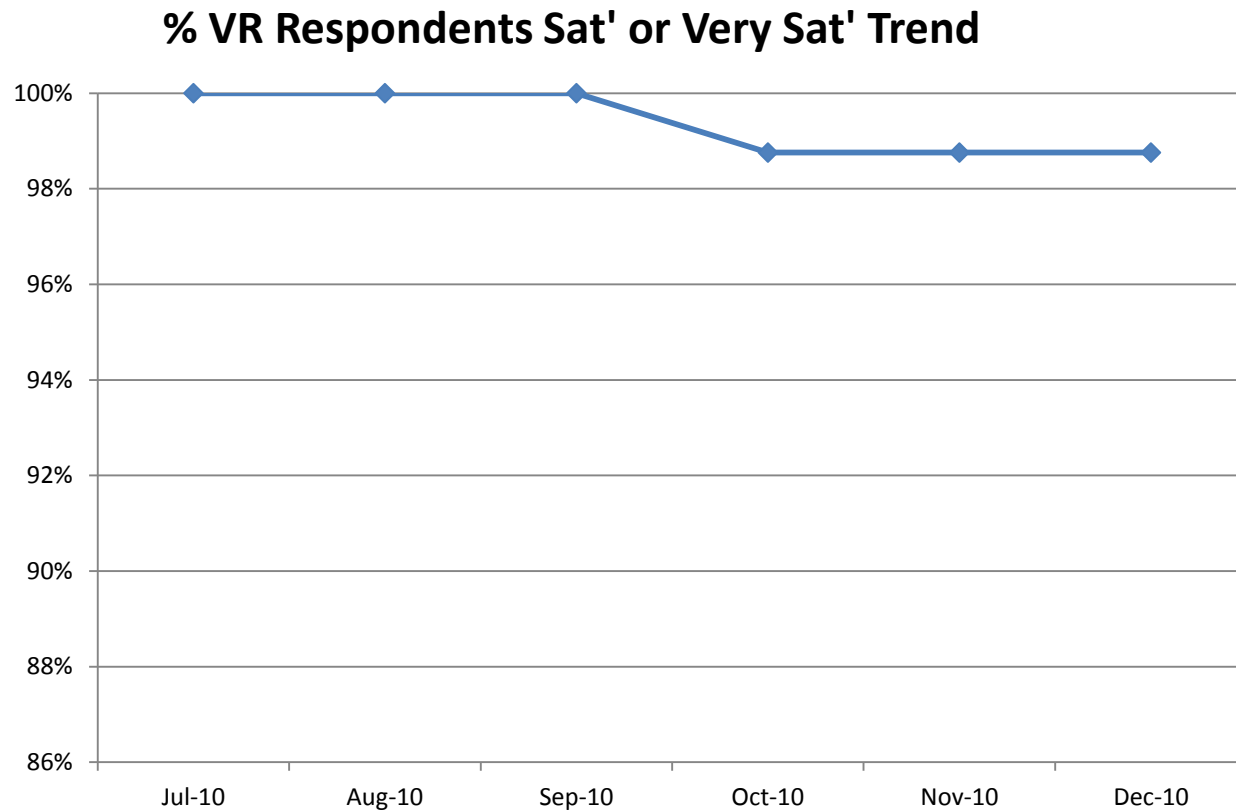**Name:** _____ **Phone and/or Email:** _____

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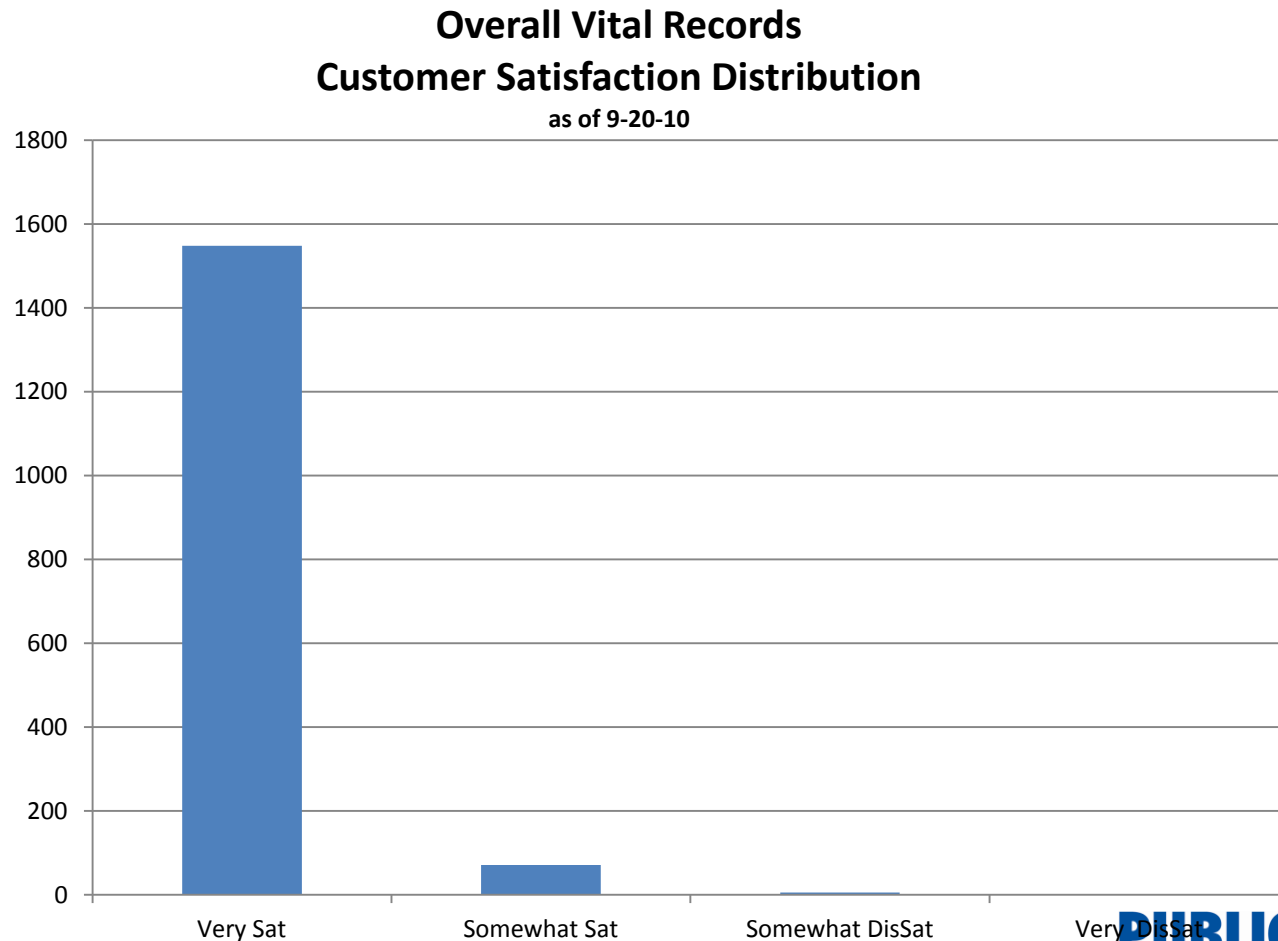**HEALTHIER WASHINGTON**

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Trending Satisfaction Data Example

% VR Respondents Sat' or Very Sat' Trend

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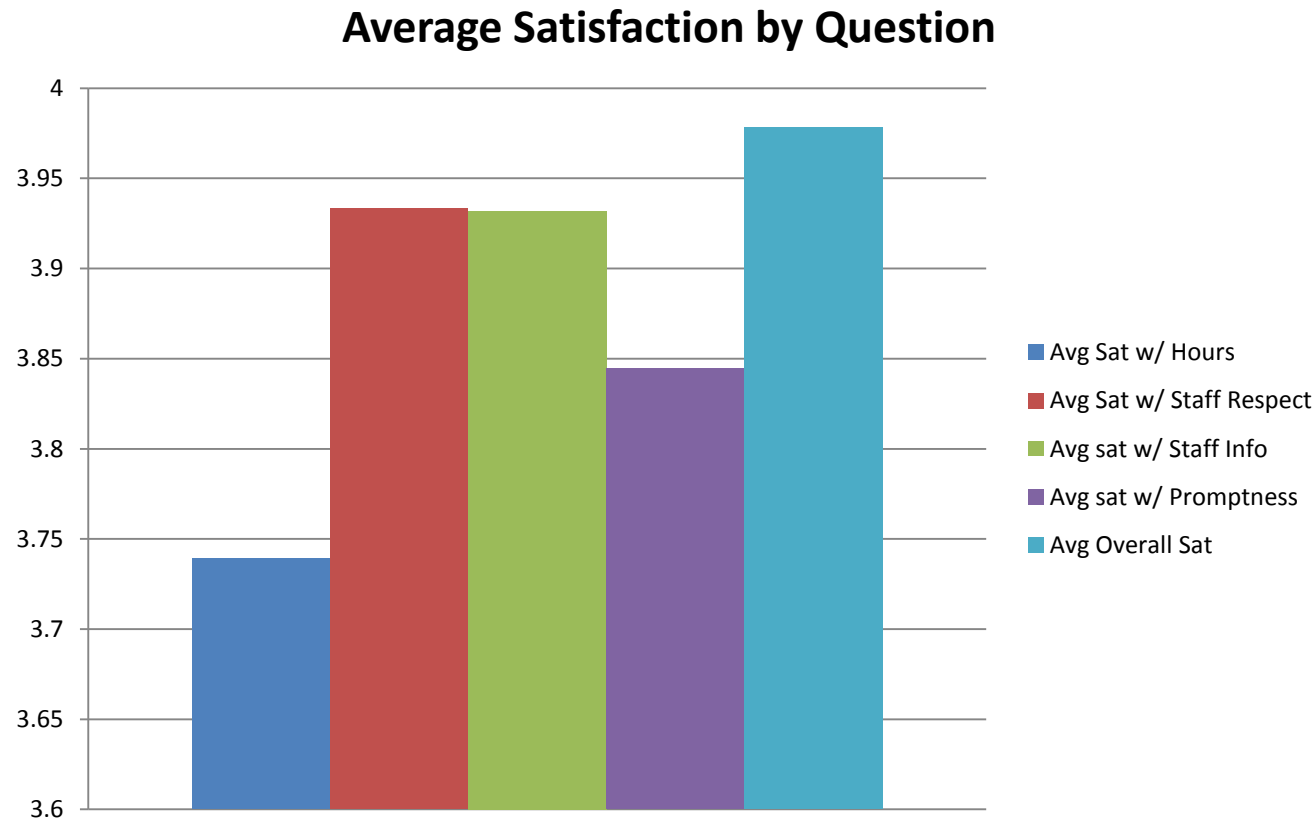
Analyzing Satisfaction Data Example

**Overall Vital Records
Customer Satisfaction Distribution**
as of 9-20-10

Analyzing Satisfaction Data Example

Average Satisfaction by Question

Legend:
- Avg Sat w/ Hours
- Avg Sat w/ Staff Respect
- Avg sat w/ Staff Info
- Avg sat w/ Promptness
- Avg Overall Sat

A word to the wise...

Pilot your survey before implementing!

Where can I get help?

References:

- <u>Measuring Customer Satisfaction</u>, 2nd Edition, Bob Hayes, ASQ Quality Press, 1997

- <u>Measuring and Managing Customer Satisfaction</u>, Sheila Kessler, ASQ Quality Press, 1996

- <u>Guide to TQM in Service Industries,</u> Noriaki Kano, APC,1989

Technical Assistance:

- Your Performance Management Center for Excellence

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Finally…

Our original objectives:

- Discern the difference between your organization's direct and indirect customers
- Describe the value of measuring and improving customer satisfaction
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- Identify options for collecting qualitative information
- Apply a Likert scale
- Identify factors for analysis

Thank you for joining us!

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